



TEN MILLION TOURISTS IN 2010 HOW MOROCCO CAN SUCCEED BY DEVELOPING E-TOURISM

[Exploratory paper]

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Abstract

Since 2001 tourism development has become a priority in the economic expansion of Morocco. An agreement between the government and the business confederation (CGEM) expects ten million tourists in 2010. Achieving this objective should undoubtedly be done through a reinforcement of promotion campaigns towards overseas countries. In addition, Morocco also expects ten million Internet users on its domestic territory within the next three years. Both goals represent a challenge for tourism professionals as much as for IT experts. However, local and national tourism operators continue to favor traditional distribution channels and let e-tourism practices in the hands of foreign companies. This paper roughly analysis this situation and points to government interventionism allowing to develop a favorable environment do develop synergies between the two sectors. The two objectives can then be conceived as a whole and be more easily attained.

Keywords: Morocco, Tourism, ICT policy

1. INTRODUCTION: SOME WORDS ABOUT E-TOURISM

Relying on multiple indicators one can note that tourism takes a lot of benefits from the World Wide Web continuous expansion (Buhalis, 1998, Raffour, 2003). Figures show that in 2005, more than 14 billion dollars were generated by e-tourism worldwide. In Europe, during the last four years, the annual growth of e-tourism has varied between 40 and 50 % (Longhi, 2007).

It seems to be clear that the Internet induced an in depth renewal of the industry. Firstly, the Web provides an unlimited amount of information directly accessible at very low cost. This is an important characteristic since tourism products are most of the time experience goods, i.e. intangible products and services cannot be physically displayed at sale points before purchasing. Indeed, tourism services are bought before the time of their use and not at the place of consumption (Buhalis, 2003). A system based on shared knowledge (critics and advices) is thus particularly well indicated (Gensollen, 2003). This has led to the emergence of online intermediaries reducing information asymmetries on the tourism market (Belleflamme, 2006). Secondly, the emergence of Internet has been the impulse for organizational change within the tourism sector. The appearance of global distribution systems (GDS) in the airline industry is an example of organizational innovation allowed by the IT revolution (Longhi, 2007). GDSs have become travel supermarkets offering information and reservation capabilities for the whole range of travel products (schedules, accommodation, car rentals, etc.). Moreover, as pointed out by Buhalis, GDSs control and distribute the vast majority of airline seats (Buhalis, 2003). Thirdly, new interdependences and connections in the sector came into appearance. More than a simple digitalization of relationships, a global movement operated by all stakeholders to match globalization new rules has arisen. In the airline industry, one can mention the strategic alliances among different airline companies (i.e. *Star Alliance*); such collaboration between actors remaining competitors has paved the way for a new strategic literature: *coopetition* (Nalebuff and Brandenburger, 1996).

2. MOROCCO: THE E-TOURISM FAILURE

Morocco does not dispose of natural oil resources. Its economy is mostly based on industry, agriculture and tourism. With a strategic situation and extraordinary natural assets (for ex. 3.500 km of coastlines), the country can rely on tourism for future economic developments. The challenge of receiving 10 million tourists by the year 2010 ("Vision 2010" plan introduced by the King Mohammed VI in January 2001) has now become a government priority and population do expect a lot from it. It also seems to be clear that a growth in the use of ICT would enlarge e-tourism potentialities. Ten million net surfers and ten million tourists in 2010 represent challenges for both information technology professionals and operators of the tourism sector.

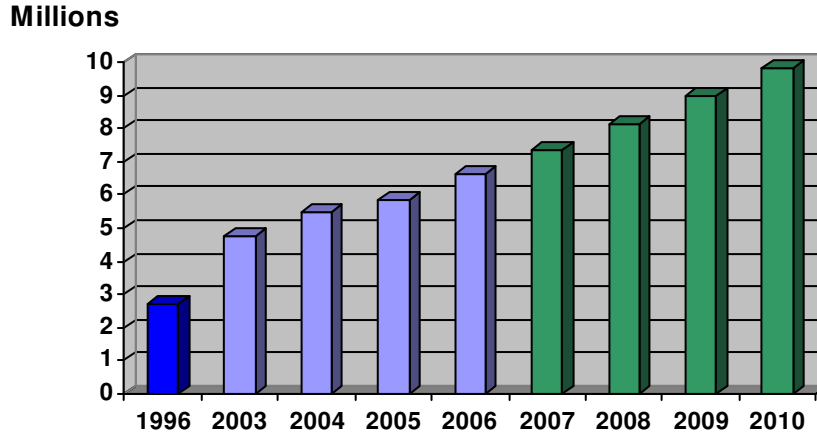


Figure 1. Evolution of annual tourist's number (Morocco)
(blue: official reports / green: prediction)

At half of the way, Morocco starts to collect the profits of its voluntarist policy (Cherkaoui, 2007). In 2006, 6.6 million tourists came to Morocco (in comparison to 2.7 million in 1996). For the first time, tourism receipts became the first source of income in front of the transfers of abroad residing Moroccans (look at *Figure 1*). However, how to preserve this ascending growth curve and to carry out the objective of ten million tourists within five years remains an open issue. A serious option to consider is the ICT. Hundreds of hotels and 600 travel agencies operating onto the local market must integrate Internet in their expansion strategy. This strategy must be articulated on two components: reinforcement of visibility and presence (using e-pub, Web sites, referencing, viral marketing...) as well as an easy and instantaneous services offering (reservation and online payment).

Touristic market actors however under-exploit the advantages provided by visibility on the Web to sell their products. They more often continue to make use of traditional distribution and promotion channels. Nowadays, on the Web, packages bound with Moroccan tourism are marketed rather by the sector virtual giants like expedia.fr, partirpascher.com and lasminute.com than by domestic websites. The main consequence of a too timid online presence for Moroccan tourism professionals is a considerable loss of earnings, since more than 20% of the 750 million worldwide tourists buy their voyages online.

3. A NEED OF LOCAL AND NATIONAL IT-BASED TOURISM DEVELOPMENT PLAN

The aim of this section is to identify possible strategies for developing e-Tourism into Morocco.

3.1 Actors Identification

The first step toward developing an e-Tourism deployment strategy is to identify the stakeholders and their interdependencies, goals and objectives. To realize such an analysis the i* framework (Yu, 1995) will be used. Circles represent *actors*, rounded rectangles represent *goals* and clouds

represent *softgoals* (softgoals are similar to (hard) goals except that the criteria for the goal's satisfaction are not clear-cut). The arrows represent *dependencies* so that the origin actor depends of the target actor to fulfil the goal/softgoal located in the middle of the dependency.

Figure 2 depicts a simplified model of the generic actors active into Morocco tourism industry rationale. Among those actors one can find:

- The *Government* represents all the political institutions and the decision organs of Morocco;
- The *Consumer* is the tourist desiring to spend its vacation abroad;
- The *Infrastructure Provider* represents in a generic manner all the actors providing services to the Customer. Hotels, museums, restaurants, boat renters, taxis, etc. are all instances of Infrastructure Provider;
- The *Travel Agent* represents the traditional intermediate between the tourist and the infrastructure providers. They traditionally furnish a whole voyage package; every facility can be booked from home left to return. They mostly are international tourism brands;
- The *Online Tourism Service Provider* is a virtual actor – traditionally a web site – furnishing touristic information to the user. This actor can be distinguished from the previous one by the fact that it does not furnish a whole travel package but can simply provide information or more advanced services in the field of one or more domains of a tourism package.

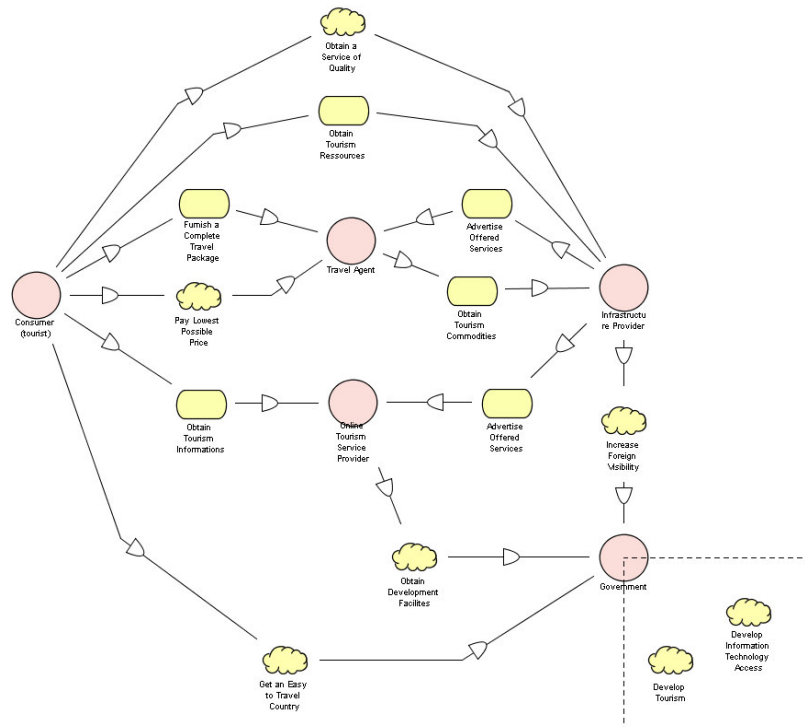


Figure 2. Actors Active in Morocco Tourism Market Rationale.

3.2 e-Tourism versus Traditional Distribution Channels

The use of information technology has rebuilt the traditional intermediation business (Neysen, 2007). Through the adequate use of information technology leading to an accurate function delegation, intermediaries active onto the virtual market can successfully compete with traditional businesses active within intermediation. Using this principle with touristic web sites, those can compete with traditional travel agents in the business of offering information and services to the customer. Indeed, if infrastructure providers can be categorized, centralized and referenced by online tourism service providers, the use of information technology can play a determinant role into tourism development in Morocco. Those Moroccan domestic web sites can offer services as comparison of prices, online booking, real-time voyage composition, etc.

3.3 Morocco's Government Challenge

The biggest challenge for Morocco's government to complete the double objective of developing tourism and to develop information technology access is to furnish a favourable environment for the development of a panel of domestic companies proposing web sites helping tourists and infrastructure providers to come together.

On the basis of the analysis of previous sections, such an objective can be obtained by:

- Identifying the domains of interest for the tourist desiring to come to Morocco where useful information can be provided (for example flights, hotels, sites to visit, etc.);
- Develop common knowledge bases in the form of web sites where tourists can find the information;
- Develop meta-knowledge bases also in the form of web sites to offer tourists complete travel packages. This can allow competing with traditional travel agencies.

The main government role is to help domestic companies' creation or existing ones to go into business so that ICT domestic development can be doped. This would lead to evident economic repercussions. The success of such an operation can come from Morocco's government strategic position allowing favouring information access to domestic companies.

4. CONCLUSION

Morocco is a country facing a tremendous economic growth so that the government faces numbers of challenges induced by the development of multiple sectors. The issue of achieving those challenges successfully is from primary importance to increase the standard of living of the Moroccan population. Among those challenges, the development of tourism and ICT access into the country are in primary places. They consequently should as much as possible be envisaged as a whole in order to favour synergies and maximize chances of success.

This exploratory paper envisages government interventionism to create a favourable environment for domestic companies to build tourism web sites encapsulating information on different domains of interest. Thanks to its dominant strategic position the Moroccan's government can succeed in such a task. This will help achieving the double objective of developing tourism and provide a larger access to ICT by population.

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